Rio 5.0
Quick Start Guide

January 8, 2016

Permissions

Auto-provisioned roles:

- **Standard** - Auto-provisioned to all job codes applicable to Retail store employees not belonging to the SAPR, Preservation, or Family Room roles below.
- **SAPR** - Auto-provisioned to ASLP, Inventory Specialist, BOH Specialist, Genius Admin, and Managers.
- **Preservation** - Auto-provisioned exclusively to Operations Specialists.
- **Family Room** - Auto-provisioned exclusively to Genius Admins.

You need SAPR access privilege to:

- Add an SAPR[1] asset to Rio.
- Remove an SAPR asset from Rio.

You need to be a BOH Specialist or Inventory Specialist to:

- Add an SAPR or IS&T asset to Rio.
- Remove an SAPR asset from Rio.

You need EasyTrack Admin privilege[2] to:

- Assign an EasyTrack Number to an EasyTrack device.
- Enable or disable an EasyTrack device.

You need to be a BOH Specialist, Inventory Specialist, or EasyTrack Admin to:

- Change an asset's Category.
- Transfer an IS&T asset to the warehouse.

Signing in or out and getting help

How to sign in:

- Go to https://retail-io.corp.apple.com in Safari and supply your AppleConnect login credentials.

How to sign out:

- Click the user name in the title bar and click *Sign Out*.

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1 SAPR assets are finished goods assets in the ISU and Demo buckets.

2 P&O Specialists and IS&T Champions are auto-provisioned to have EasyTrack Admin privilege. Request EasyTrack Admin privileges through the Account Manager.

How to get help:

- Click the user name in the title bar and click *Quick Start* to see this guide, or click *User Guide* to open the Rio User Guide.

Selecting and displaying assets and asset data

How to display assets:

1. Click **Location**, **Category**, **Group**, **Part Number**, or **Status** in the sidebar to see the Locations, Categories, Groups, or Part Numbers that have assets assigned to them, or different Statuses that assets have.
2. Click an entry in the asset list[3] to see the assets in the selected set.

How to filter assets:

- Enter text in the *Search* field (above the *asset list*) to select assets whose attributes match your search term.
- Click the *Asset Filter* button (to the right of the *Search* field) and select a bucket from the drop-down menu.
- Click **Status** in the sidebar, and select a status of interest in the asset list.
- Any combination of the above.

How to see detailed asset information:

- Click a single asset card in the asset list. The asset's properties and tasks you can run are in the *Asset Details* form on the right.

How to select multiple asset cards in the asset list:

- Shift-click to select a range of asset cards.
- Command-click to select or deselect asset cards at random.
- Press command-a to select all asset cards.

How to execute a task:

1. Select one or more assets in the asset list.
2. Select a task in the *Tasks* section to display a form for the task.
3. Fill out the task form.
4. Click **Submit** to initiate the task.

Note: See also "*Using the Batch Queue*."

Different ways to see how many assets you have:

1. Click **Overview** in the sidebar. The *Asset Counts* section shows the total number of assets and how many are in Demo, ISU, and IS&T.
2. Generate an *Unfiltered Inventory* report. An *Overview* or *Tally* report lists all assets in inventory, and a *Demo Tally* or *ISU Tally* report lists all assets in the associated bucket.
3. Enter a *Search* term and/or set the *Asset Filter*, and generate a *Filtered Inventory* report. The filtered *Overview* or *Tally* report lists all assets that match the *Search* term and *Asset Filter*.

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3 The *asset list* is the column to the right of the sidebar that lists currently assigned Locations, Categories, Groups, Part Numbers, or Statuses, or the asset cards in a chosen set.

Adding assets

Two steps:

1. Build a list of assets in the Add Queue.
2. Specify properties for the assets and add them to Rio.

How to add assets to the Add Queue:

1. Click **Add Assets** to open an *Add Assets* form.
2. Scan, type, or paste a part number or UPC in the *Input* field to add a transaction item to the Add Queue.

   Note: Only BOH Specialists and Inventory Specialists can add assets.

   Note: An asset can only be added if the Categories, to which it can be assigned, are compatible with Categories that can be assigned to assets already in the Add Queue. If not, add the asset separately.
3. If the asset is serialized, scan, type, or paste the serial number, IMEI/MEID, and ICCID (if any) as directed by text in the transaction item.
4. If the asset is not serialized, optionally edit the quantity in the entry's title, or enter the part number again to increment it.
5. Repeat steps 2-4 until all assets have been added to the Add Queue, then specify their properties and add the assets in the Add Queue to Rio as described below.

How to display the Add Queue:

1. Click **Add Assets** in the sidebar.

How to specify properties and add assets in the Add Queue to Rio:

1. First enter all assets in the Add Queue.
2. Select *Category* in the *Add Assets* form. (Category is required for all SAPR assets.)

   Note: Categories depend on part numbers. You can only select the Category if multiple Categories are available to all assets in the Add Queue.

   Note: See the Rio user guide for information about Category selection.
3. Click the *Location* field and select a Location from the drop-down menu. (Optionally type the first few characters of the Location to focus on a shorter list. Location is required.)
4. Click the *Group* field and select a Group from the drop-down menu. (Optionally type the initial characters of the Group name to focus on a shorter list. If no Group matches your string, the string you type is used as the name and added to the menu. Group is optional.)
5. Click the *Position* field and type a 1-4 character alphanumeric value. (Position is optional, and is not present if Category is assigned to an EasyTrack Category.)
6. Optionally enter *Note*.
7. Click **Add** to add the assets in the Add Queue to Rio.

Using the Batch Queue

Two steps:

1. Build a list of assets in the Batch Queue.
2. Initiate a task for all assets in the Batch Queue.

How to add assets to the Batch Queue:

1. Select one or more assets.
2. Click the **Add to Batch** button.
3. Repeat steps 1-2 until all assets of interest are in the Batch Queue. You can add assets from multiple Locations, Categories, Groups**,** Part Numbers, and/or with different Statuses, and use *Search* and/or the *Asset Filter* to help find them.
4. Initiate a task for all assets in the Batch Queue.

How to display the Batch Queue:

1. Click **Batch Task** in the sidebar.

How to initiate a task for assets in the Batch Queue:

1. Click **Batch Task** in the sidebar.
2. Select a task in the *Tasks* section to display a form for the task.
3. Fill out the task form.
4. Click **Submit** to initiate the task.

Note: See also "*How to execute tasks*."

Assigning Categories

Categories are assigned in *Add Assets*, and are based on part numbers.

Note: See the Rio user guide for information about Category selection.

How to change a Category assignment:

1. Select one or more assets or put them in the Batch Queue. The assets must have Apple serial numbers, not be in EasyTrack categories and be checked out, not be registered for Joint Venture, and not have incompatible Category assignments.
2. Click **Change Asset Category** in the *Tasks* section to open a *Change Asset Category* form.
3. Click the *Category* selector and select a Category from the drop-down menu.
4. Click **Submit**.

Note: Categories can only be changed if there are other Categories that Rio manages in the same way.

Note: Only BOH Specialists, Inventory Specialists, and EasyTrack Admins can change Category assignments.

Note: Changing the Category for an EasyTrack asset resets its EasyTrack Number. Use *Modify EasyTrack Device* to assign a new one.

Registering assets for EasyTrack

Assign an EasyTrack Category to the asset when you add it to Rio.

Note: See the Rio user guide for information about EasyTrack Categories.

Changing asset Location, Group, or Position

1. Select one or more assets or put them in the Batch Queue.
2. Click **Move Assets** in the *Tasks* section to open a *Move Assets* **f**orm.

3. Optionally click the *Location* field and select a Location from the drop-down menu. Type a matching string to focus on a shorter list.
4. Optionally click the *Group* field and select a Group from the menu. Type a matching string to focus on a shorter list. If no Group name matches your string, the string you type is used as the name and added to the menu.
5. Optionally type a 1- to 4-character alphanumeric value for Position.
6. Optionally enter *Note*.
7. Click **Submit.**

Removing SAPR assets

1. Select one or more SAPR assets or put them in the Batch Queue.

   Note: You cannot remove IS&T assets. Instead, transfer them to an IS&T warehouse for deallocation, or contact HelpLine.

   Note: Only BOH Specialists and Inventory Specialists can remove SAPR assets.
2. Click **Remove Assets** in the *Tasks* section to open a *Remove Assets* form.
3. Click the *Bucket* selector and choose the reason for the removal.
4. Optionally enter *Note*.
5. Click **Submit**.

Reporting thefts of SAPR assets

How to report theft of an SAPR asset

1. Select the stolen asset.
2. Click **Report Asset Theft** in the *Tasks* section to open a *Report Asset Theft* form.
3. Describe the event in *Note*.
4. Click **Submit**.

Note: You do not file Theft Reports for IS&T assets. Assume the standard device replacement process: open a ticket to have the item removed from Rio, reported as stolen, and replaced.

How to cancel a Theft Report

1. Click the relevant **Theft** object in the sidebar.
2. Click **Cancel**.

Transferring data for IS&T assets

Note: Only BOH Specialists, Inventory Specialists, P&O Specialists, and IS&T Champions can transfer IS&T assets.

1. Select one or more IS&T assets or put them in the Batch Queue.
2. Click **Transfer Assets** in the *Tasks* section to open the *Transfer Assets* form.
3. Click the *Site* field and select a warehouse from the drop-down menu. Optionally type a matching string to focus on a shorter list.
4. Scan, type, or paste the FedEx, DHL, UPS, or other carrier waybill number in the *Shipping* field.

5. Scan, type, or paste the Espresso or CentralStation ticket number in the *IS&T Ticket Number* field.
6. Enter details about the condition or status of the assets and/or the reason for their transfer in *Note*.
7. Click **Submit** to transfer asset data and remove it from your site.

Adding notes to assets

1. Select one or more assets or put them in the Batch Queue.
2. Click **Add a Note** in the *Tasks* section to open an *Add a Note* form.
3. Enter *Note*.
4. Click **Submit**.

Note: Use *View Asset History* to see the note.

Viewing asset transaction history

How to view an asset's notes and transaction history:

1. Select a single asset in the asset list.
2. Click **View Asset History** in the *Tasks* section to display the asset's transaction history.
3. Scroll to the item of interest.

How to view transaction history for all assets:

1. Click **Overview** in the sidebar.
2. Set ***Start Date*** and ***End Date*** (in GMT) in the *History Reports* section.
3. Click the **History Event Report** selector to generate a *History* report.

Enabling or disabling an EasyTrack device and/or changing its EasyTrack Number

Note: Only EasyTrack Admins can use the *Modify EasyTrack Device* task.

1. Select a single asset in the asset list. The asset must be registered for EasyTrack.
2. Click **Modify EasyTrack Device** in the *Tasks* section to open a *Modify EasyTrack Device* form.
3. Optionally enter an EasyTrack Number in the *Number* field. The value must be 1-9999 and be unique within the asset's Category.
4. Optionally click the *Status* field and choose *Enabled* or *Disabled* in the drop-down menu.
5. Optionally enter *Note*.
6. Click **Submit**.

Viewing an asset's EasyTrack history

1. Select a single asset in the asset list.
2. Click **View EasyTrack History** in the *Tasks* section to view a history of the asset's EasyTrack events.
3. Scroll to the item of interest.

Administering EasyTrack devices

Note: See the Rio user guide for information about EasyTrack Categories.

How to register an asset with EasyTrack:

1. Assign an EasyTrack Category to the asset when you add it.

   Note: This can only be done by BOH Specialists and Inventory Specialists.

How to see which assets are registered with EasyTrack:

1. Click **Category** in the sidebar to see Categories that are currently being used. (Assets in EasyTrack Categories are registered with EasyTrack.)
2. Click an individual Category to see assets that are assigned to it.

Or

1. Generate a *Device Overview* report and open the report in Numbers or Excel.

How to see which assets are assigned to deprecated Categories:

1. Click **Status** in the sidebar.
2. Select **Incorrect Asset Category** in the asset list.

Note: Use the *Change Asset Category* task to assign valid Categories to these assets.

How to see which assets are assigned to deprecated Locations or In Transit:

1. Click **Status** in the sidebar.
2. Select **Incorrect Asset Location** in the asset list.

Note: Use the *Move Asset* task to assign valid Locations to these assets.

How to assign an EasyTrack Number to an EasyTrack device:

1. Select the asset and use the *Modify EasyTrack Device* task.

   Note: This can only be done by EasyTrack Admins.

How to see which EasyTrack devices have no EasyTrack Number:

1. Click **Status** in the sidebar.
2. Select **Device Number Unassigned** in the asset list.

How to see which EasyTrack devices are checked out (or checked in):

1. Click **Status** in the sidebar.
2. Select **Checked Out** (or **Checked In**) in the asset list.

Or

1. View their status using EasyTrack Desktop.

How to see which EasyTrack devices are overdue (checked out longer than 9 hours):

1. Click **Status** in the sidebar.
2. Select **Checked Out Overdue** in the asset list.

Or

1. View their status using EasyTrack Desktop.

How to see who has EasyTrack devices checked out:

1. Click **Status** in the sidebar.

2. Select **Checked Out** in the asset list.

Or

1. Generate a *Device Overview* report and open the report in Numbers or Excel.
2. Sort the spreadsheet by *Status*, then by *Current Owner*, and then by *Category*. (The checked out devices are grouped together, ordered by employee and then by *Category*.)

Or

1. View their status using EasyTrack Desktop.

How to enable to disable an EasyTrack device:

1. Select the asset and use the *Modify EasyTrack Device* task.

   Note: This can only be done by EasyTrack Admins.

How to see which EasyTrack devices are disabled:

1. Click **Status** in the sidebar.
2. Select **Device Disabled** in the asset list.

How to see which EasyPay 5 iPhones have not been activated:

1. Click **Status** in the sidebar.
2. Select **Ready for Activation** in the asset list.

How to see the history of EasyTrack events for an asset:

1. Select the asset and use the *View EasyTrack History* task.

How to see which assets are locked:

1. Click **Status** in the sidebar.
2. Select **Locked** in the asset list.

Registering assets for Joint Venture

How to register an asset for Joint Venture:

1. Select an asset in the *Joint Venture Loaner* Category.
2. Click **Register Joint Venture Loaner** in the *Tasks* section to open a *Register Joint Venture Loaner* form.
3. Optionally enter *Note*.
4. Click **Submit**.

How to tell whether an asset is registered for Joint Venture:

1. If the asset is not in the *Joint Venture Loaner* Category, it can't be.
1. If the asset is in the *Joint Venture Loaner* Category:
   1. Select the asset.
   2. If the *Asset Details* form contains a *Joint Venture Loaner* section, or if the *Tasks* section includes *Change Joint Venture Loaner State* and *Unregister Joint Venture Loaner*, it is.

How to change the Joint Venture Loaner state of an asset:[4]

1. Select the asset.

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4 Recording an asset's loan to a customer, its return, or its purchase in iRepair, also changes its Joint Venture Loaner state in Rio.

2. Click **Change Joint Venture Loaner State** in the *Tasks* section to open a *Change Joint Venture Loaner State* form.
3. Click the *Movement* selector and choose the next loaner state.
4. Optionally enter *Note*.
5. Click **Submit**.

How to unregister an asset from Joint Venture:

1. Select the asset.
2. Click **Unregister Joint Venture Loaner** in the *Tasks* section to open an *Unregister Joint Venture Loaner* form.
3. Optionally enter *Note*.
4. Click **Submit**.

Asset administration

How to specify the serial number for a serialized asset that doesn't have one recorded:

1. Select the asset.
2. Click **Assign Serial Number** in the *Tasks* section to open an *Assign Serial Number* form.
3. Enter the asset's serial number.
4. Optionally enter *Note*.
5. Click **Submit**.

How to see which assets are assigned to deprecated Categories:

1. Click **Status** in the sidebar.
2. Select **Incorrect Asset Category** in the asset list.

Note: Use the *Change Asset Category* task to assign valid Categories to these assets.

How to see which assets are assigned to deprecated Locations or In Transit:

1. Click **Status** in the sidebar.
2. Select **Incorrect Asset Location** in the asset list.

Note: Use the *Move Asset* task to assign valid Locations to these assets.

Generating reports

How to generate unfiltered inventory reports:

1. Click **Overview** in the sidebar.
2. Click the **Overview Report**, **Tally Report**, **Demo Tally Report**, or **ISU Tally Report** selector.

How to generate a History Event report:

1. Click **Overview** in the sidebar.
2. Set ***Start Date*** and ***End Date*** (in GMT) and click the **History Event Report** selector.

How to generate an EasyTrack Device Overview report:

1. Click **Overview** in the sidebar.

2. Click the **Device Overview Report** selector.

How to generate filtered reports:

1. Select **Location**, **Category**, **Group**, **Part Number**, or **Status** in the sidebar.
2. Enter text in the *Search* field and/or select an *Asset Filter*.
3. Click the **Overview Report** or **Tally Report** selector.

For more information

- Rio and EasyTrack Release Notes - http://retail-io.corp.apple.com/help/release-notes
- Rio Quick Start Guide - http://retail-io.corp.apple.com/help/quickstart (this guide)
- Rio User Guide - http://retail-io.corp.apple.com/help/user-guide
- Rio Mobile User Guide - http://retail-io.corp.apple.com/help/mobile
- EasyTrack User guide - http://easytrack.corp.apple.com/help